accenture

To: Anne Teresa, FSA

From: Howard Weitzner, Accenture

Date: January 31, 2003

Subject: Deliverable 95.3.1b Training Services Summary

Purpose

This memo summarizes the results of Training and Organizational Development Services provided to FSA University during the period January 1 - January 31, 2003. The results were delivered through detailed supporting materials and working sessions with FSA University staff. The work effort addressed improvements to FSA University's training services and organizational design.

Initiatives this Period

Specific initiatives addressed during this period included:

- FSA University strategic planning and organization development
- External Partner "100 Series" Training Curriculum Planning
- Skills Catalog
- Performance Consultant
- Training process team
- Training development team support
- Cost analysis team
- Resource planning
- LMS support

Planned Initiatives

During the period February 1 – February 28, 2003, the following initiatives may be addressed, but not limited to:

- FSA University strategic planning and organization development
- External Partner "100 Series" Training Curriculum Planning
- Skills Catalog
- Performance Consultant
- Training process team
- Training development team support
- Cost analysis team
- Resource planning
- LMS support

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Description of Initiatives

FSA University strategic planning and organization development
Underlying several initiatives is ongoing support for FSA University's efforts to develop and enhance its contribution to FSA and ED. Activities continue to focus on aligning FSA University's activities with the strategic goals of the organization. Activities this period included:

- Review of best practices addressing competency and capability development models and the application of these strategies to FSA
- Review of best practices concerning the centralization of training departments in an effort to optimize the service delivery model used by FSAU to provide service to its customers
- Best practice options for aligning and distinguishing a strategic HR function with a corporate university function
- Identification of "high priority" initiatives to be completed by FSAU and supported by the Integration Partner during FY03
- Continued to provide process expertise to support the development of learning tracks for the Case Management team, including discussion of eLearning development options
- Advised FSA University management on how to support FSAU staff as the One-ED process is conducted

External Partner "100 Series" Training Curriculum Planning
The Schools Curriculum Planning Team is developing a catalog of training course and other resources for new financial aid professionals, entitled the "100 Series." The "100 Series" should provide the foundation knowledge that all new financial aid professionals need to acquire by the end of the first year. Its courses and learning opportunities should be offered throughout the year.

During this period, the team conducted a survey of its stakeholders and advisors to gather input regarding the 100 Series content. The results of the survey were compiled into a survey summary, which will be used to analyze the data and formulate recommendations for the 100 Series. Based on this information, the team will determine the best means to package and deliver the 100 Series catalog to schools.

Next steps for the 100 Series team include:
- Identifying the appropriate courses and resources for the 100 Series
- Identifying the best means to package and deliver the 100 Series catalog
- Determining basic design elements of each new course (such as target audience, learning objectives, and high-level content)

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Skills Catalog
FSA University is leading FSA's efforts to develop its workforce. A key component of this approach is the identification of the skills required by FSA staff to achieve the organization's business goals. The skills catalog will be revised and updated to reflect the necessary skill set of FSA's future workforce. The information for the skills catalog will come from the GM's and Unit Directors and will be gathered and documented by FSA University. Synergies across organizational lines will also be identified. To date, support has been provided to define the vision and intended results of the skills catalog. Future support from the Integration Partner will assist FSA University with skills focused information gathering and analysis tools.

Performance Consultant
The Performance Consultant process is FSA University's service delivery model, through which FSA University supports the strategic priorities of the Channels and other Enterprise Units. During this period, the performance consultant team met to discuss an effective process for tracking service requests and collecting manager input on proposals. Next steps include solidifying and documenting the service delivery approach, implementing the tracking approach, and building consulting capabilities among staff members.

Training Development And Delivery Methodology/Process Team
The Training Development and Delivery team supports the creation and implementation of best practices for how FSA University develops and delivers training. The methodology (Plan, Design, Build, Deliver, Assess) follows a customized version of the ADDIE model (Analysis, Design, Develop, Implement, Evaluate).

During this period, the process team finalized the updated Training Process Checklist. The Training Process Checklist provides a high-level overview of design and development steps for project and team leads. In the updated version, the checklist highlights the critical milestones and includes a corresponding job aid that estimates timeframes for each milestone.

The next phases of work may include:
- Presenting the updated process manual at the FSAU All Hands meeting
- Disbursing the training process manual to all project and team leads

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Training Development Team Support
Representatives of the Training Process Team serve as coaches to training development team leads. In this capacity, coaches assist team leads with project planning and management, creation of meeting agendas, and facilitation of team gatherings. Through this, coaches educate team leads on the training process itself, including both instructional design and project management elements.

FFEL / Direct Loan / Perkins training
*   The team, led by Pennie Summers, is evaluating potential approaches to enhance existing FFEL training materials. This may involve modifications to the existing document, creation of supplemental job aids, and/or development of course activities.

Cost Analysis Tool
The cost analysis team has developed a Cost Analysis Tool (CAT) to facilitate the gathering and analysis of training cost data. This information will be used to reduce costs and optimize efficiency of future training teams. This month the team assisted with the collection and analysis of data from the TEPI course. In future periods, the team will support the FSAU finance team to develop funding model options. These funding model options will apply best practices to identify how FSA's corporate university may be funded in the future to maximize value while minimizing costs. Additionally, ad hoc support will continue to be provided as the FSA finance team uses the tool.

Specific activities in the next period may include:
*   Continue to gather and enter TEPI data into the CAT
*   Begin gathering EDExpress development data to enter into the CAT
*   Begin to discuss the results of the TEPI data, potential lessons learned etc.
*   Continue to introduce the CAT tool to training team leads, specifically during the training team kick-off meetings

Resource Planning
The Resource Planning initiative supports the organization's need to maximize and report the utilization of staff time. Once the team lead has presented an overview to managers, each manager will estimate time spent by individual employees to the projects on which they work. This data will serve as the basis for future resource planning discussions, such as when FSAU initiates a new project and wishes to determine the availability of certain staff or specific skills.

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LMS Support
FSA University Services personnel have responsibility for the day-to-day operations and system administration of the Learning Management System. Ad-hoc support continues to be provided to FSA University on an as needed basis. The Integration Partner (Accenture) continues to interface between FSA University and the vendors (Jamcracker and Saba) as needed to facilitate resolution of issues. During this month, the period of performance for the LMS was extended through December 2003. In future periods, information will be provided to FSA University as they decide whether to continue the end-user support provided by Jamcracker past its March 31, 2003 expiration.

Observations/Recommendations
During the period January 1 – January 31, 2003 the following observations were identified and will be reviewed to determine the potential impact and value for FSA University:
- FSA University is currently contracting for Level 1 End User Support for the LMS. This support expires within the next couple of months. If FSA University wishes to assume responsibility for this support, then immediate planning is necessary to provide a seamless transition. It is recommended that FSA University develop a formal transition plan. If FSA chooses, the Integration Partner can provide project management support to help organize this effort.
- FSAU staff members appear to have some uncertainty about the future of the organizational structure, in addition to being concerned about their job stability. It may be beneficial to remind staff that proposed changes will likely not occur until June or later. There may also be value to encouraging employees to strongly proceed with ongoing activities to highlight the benefits of services and offerings provided by FSAU.

Attachments:
- Strategic Planning and Organizational Design
    - Competency Development Framework
    - Competency Model High-level description
    - Technology Competency Model Overview
    - FSAU '03 Plan
- External Partner "100 Series" Training Curriculum Planning
    - Survey Summary
- Training Process Team
    - Training Process Checklist
    - Training Process Checklist Job Aid
    - Training Process Briefing
- Training development team support
    - FFEL Options
- Resource Planning
    - Resources Planning Overview